

Louisiana Travel Pulse

PRODUCED BY
THE LOUISIANA OFFICE OF TOURISM



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Louisiana Travel Pulse is a collection and analysis of statistics, research and trends relevant to the tourism industry at the local, state, national and international level.

This edition of Louisiana Travel Pulse looks at data and trends from January to June of 2009. Subsequent editions will examine three-month reporting periods. The next edition will cover July through September.

Louisiana Travel Pulse is produced by the Research and Development Section of the Louisiana Office of Tourism, a branch of the Louisiana Department of Culture, Recreation and Tourism overseen by Louisiana Lt. Governor Mitch Landrieu. The Section's mission is to collect, analyze and disseminate information that can assist Louisiana travel industry professionals at the local and state level in their tourism advertising, marketing and promotions practices.

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*Lodging Statistics***Current Month - June 2009 vs June 2008**

Occ %			ADR			RevPAR		
2009	2008	% Change	2009	2008	% Change	2009	2008	% Change
60.8	65.8	-7.6	92.13	89.61	2.8	56.01	58.93	-5.0

Year to Date - June 2009 vs June 2008

Occ %			ADR			RevPAR		
2009	2008	% Change	2009	2008	% Change	2009	2008	% Change
60.5	66.4	-8.9	94.44	98.01	-3.6	57.11	65.07	-12.2

Louisiana Gaming Gross Revenue

	2005	2006	2007	2008	2009
Riverboat					
YTD June	\$808,050,030	\$966,287,342	\$894,628,477	\$913,800,591	\$883,194,957
% Diff	0.65%	19.58%	-7.42%	2.14%	-3.35%
Land-based					
YTD June	\$178,129,913	\$144,137,182	\$204,585,500	\$211,611,233	\$185,152,633
% Diff	12.05%	-19.08%	41.94%	3.43%	-12.50%
Racinos					
YTD June	\$172,113,930	\$194,907,074	\$185,434,845	\$200,427,791	\$214,519,677
% Diff	24.61%	13.24%	-4.86%	8.09%	7.03%

State Park Louisiana Visitors

	2005	2006	2007	2008	% Change	2009	% Change
January	101,007	64,202	68,243	70,645	3.5	93,959	33.0
February	118,937	73,225	83,403	100,753	20.8	110,584	9.8
March	214,670	124,824	169,583	167,092	-1.5	162,954	-2.5
April	248,016	176,534	178,737	195,623	9.4	209,383	7.0
May	249,452	164,718	206,399	234,955	13.8	247,207	5.2
June	302,174	213,955	231,278	240,754	4.1	288,108	19.7
July	282,518	207,289	196,678	278,474	41.6		
August	170,370	114,911	145,908	143,618	-1.6		
September	110,502	122,020	116,885	70,868	-39.4		
October	79,118	107,744	117,376	114,450	-2.5		
November	70,456	110,132	117,681	134,024	13.9		
December	65,883	78,171	79,478	76,376	-3.9		
Total	2,013,103	1,557,725	1,711,649	1,827,632	6.8	1,112,195	

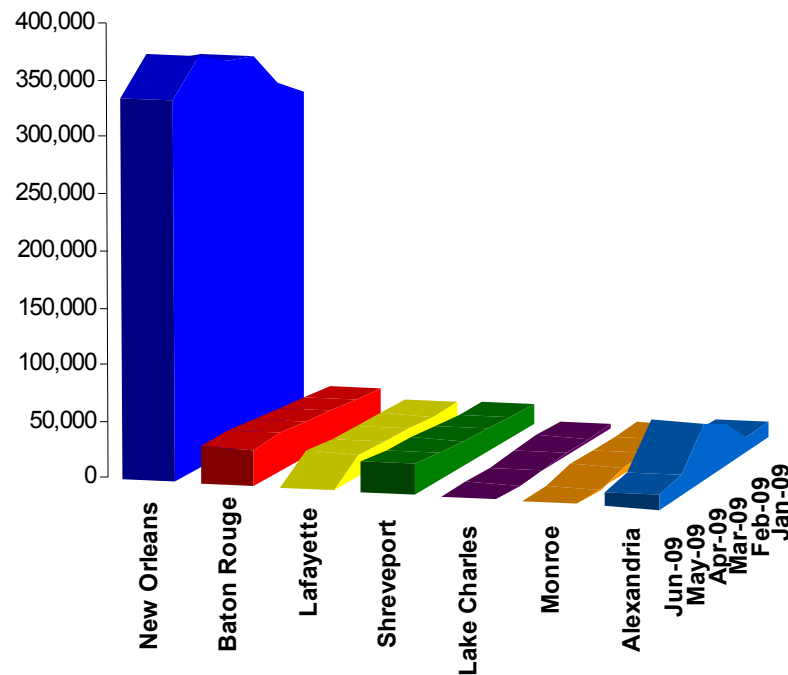
Louisiana Tax Free

2009	JAN	FEB	MAR	APR	MAY	JUNE
Number of Ref. Transactions	1,247	1397	1261	1415	1187	3683
Number of Sales	5,561	5763	5094	5454	4868	14563
Retail Spending	\$1,279,454	\$1,149,013	1,108,990	\$1,139,679	\$941,229	\$2,525,118
Sales Tax Refunded	\$102,610	\$92,559	\$89,362	\$92,111	\$75,569	\$204,404

The Air Transport Association reported June passenger revenue for the largest U.S. airlines fell 26 percent, compared with June 2008—marking the eighth consecutive month of year-over-year declines. That the number of passengers is down only 6.5 percent indicates the absence of high-yielding business passengers.

Airport Enplanements

	New Orleans	Baton Rouge	Lafayette	Shreveport	Lake Charles	Monroe	Alexandria	Totals
Jan-09	295,341	24,770	15,516	18,537	2,945	6,020	12,739	375,868
Feb-09	312,998	27,338	15,341	18,108	3,023	5,906	12,740	395,454
Mar-09	344,952	29,484	16,112	20,600	3,187	6,738	35,741	456,814
Apr-09	350,381	31,802	17,711	22,372	unavailable	6,686	49,628	478,580
May-09	363,085	33,604	19,541	24,166	unavailable	unavailable	16,374	456,770
Jun-09	334,737	32,085	unavailable	26,652	unavailable	unavailable	12,393	405,867
Totals	2,001,494	179,083	84,221	130,435	9,155	25,350	139,615	2,569,353



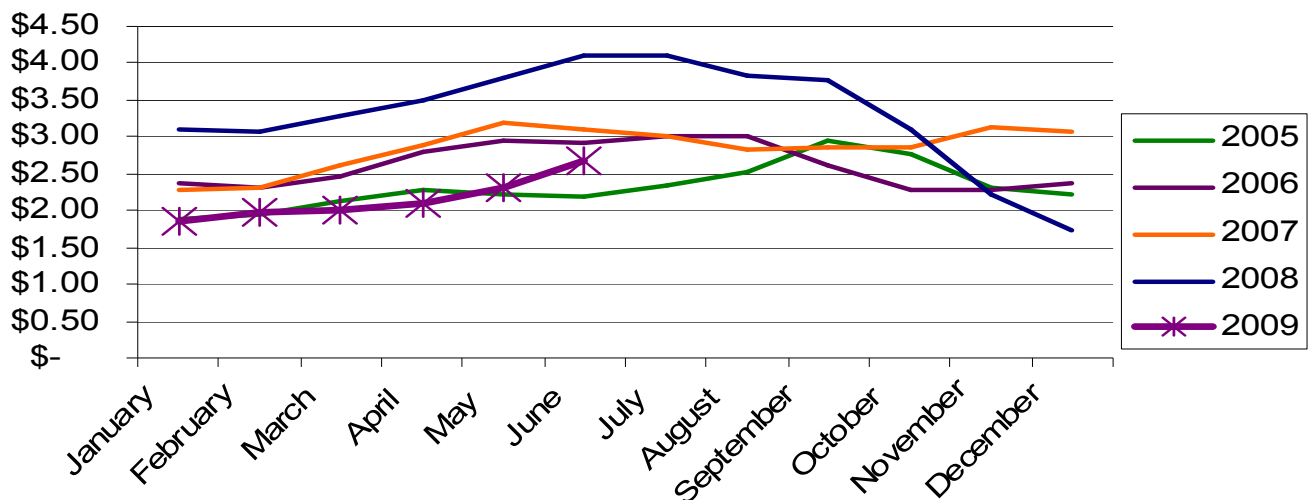
Average Price of Gas Per Gallon

U.S average prices for regular-grade gasoline, which reached \$2.69 per gallon in late June, have fallen back slightly. Gasoline prices are expected to stay near current levels but will be strongly influenced by any changes in crude oil prices.

The annual average regular-grade gasoline retail price in 2009 is expected to be \$2.36 per gallon.

Higher projected crude oil prices next year are expected to boost the average price to \$2.69 per gallon in 2010. *Source: US Energy Information Administration*

National Average Gas price



Amtrak Ridership

Amtrak provides intercity passenger rail service to more than 500 destinations in 46 states on a 21,000-mile route system. During FY 2008 (Oct. 2007-Sept. 2008), Amtrak saw 28.7 million passengers. An average of more than 78,000 passengers ride on up to 300 Amtrak trains per day. During FY08, Amtrak served the following Louisiana locations:

City Boardings

Hammond	14,695
Lafayette	3,835
Lake Charles	2,200
New Iberia	1,181
New Orleans	154,532
Schriever	1,029
Slidell	6,221
Total Louisiana Station Usage:	183,693

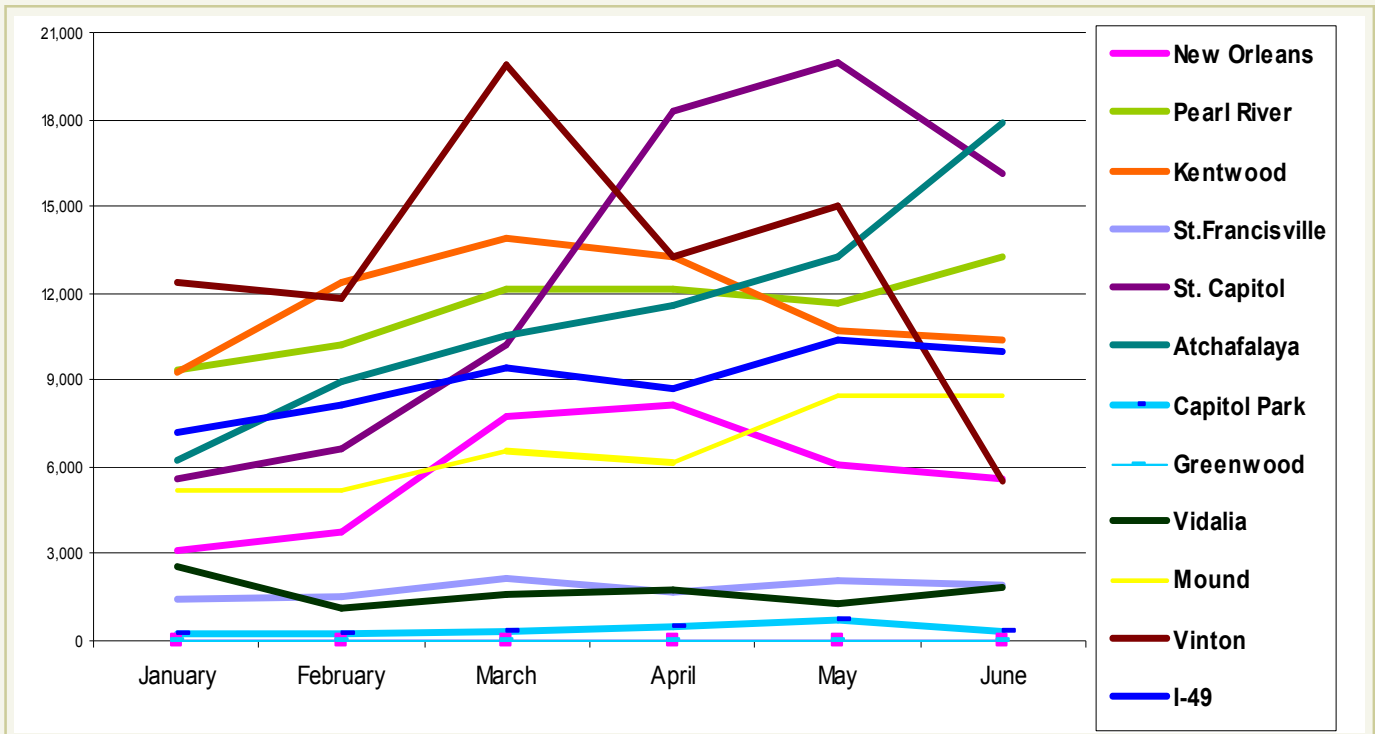


At the end of FY08, Amtrak employed 203 Louisiana residents. Total wages of Amtrak employees living in Louisiana were \$11,377,324 during FY08.

Source: Amtrak

Welcome Centers

- ◇ Louisiana Welcome Centers greeted over 1 million visitors in 2008.
- ◇ The Vinton Welcome Center closed in June for work that is expected to be complete in the third quarter of 2009.
- ◇ The Greenwood Welcome Center closed in April 2008 for work that is expected to be complete in the third quarter of 2009.
- ◇ The Slidell Welcome Center reopened in August 2009 after a two-year closure for construction projects.



2009 African-American Traveler Perception Study

A study into African-American traveler perception of Louisiana as a travel destination is now available from the Louisiana Office of Tourism. The study surveyed travelers of all races from around the U.S. on a variety of travel-related topics including:

- Intent to visit Louisiana in the next year;
 - Favorite travel-related activities, like shopping, attending fairs and festivals and visiting historic and culturally-significant sites;
 - Perception of personal safety; and
 - Perceptions of value and satisfaction before and after a Louisiana travel experience
- The report will be posted on the LOT research website.

www.crt.state.la.us/TOURISM/RESEARCH/documents.aspx

Department News

Scenic Byways

The Office of Tourism's Louisiana Byways Collection recognizes the state's memorable roads, preserves them and promotes them to travelers – highlighting historic, scenic, cultural and recreational opportunities within the roads' corridors to fuel tourism and subsequent economic development.

Louisiana's collection is part of a National Byways Program, funded and administered by the Federal Highway Administration. States join voluntarily, create their byways programs and compete for state and national scenic byway honors and federal grants. These funds are spent in the corridors to enhance and strengthen both travel experience and local economies.

For details on the Louisiana Byways program, contact Doug Bourgeois, Program Director
dbourgeois@crt.state.la.us or 225-342-8146

Atchafalaya National Heritage Area

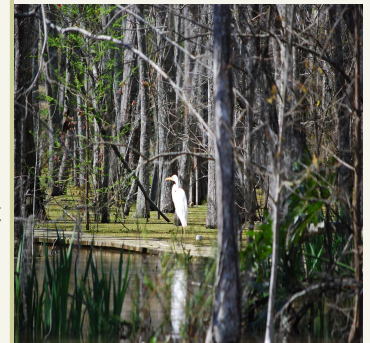
The Atchafalaya National Heritage Area is 14 Louisiana parishes in south central Louisiana forming the 838,000-acre corridor (or "basin") of the Atchafalaya River. It is the largest river-swamp ecosystem in the U.S., a haven for diverse wildlife and plant life, and it is considered to be one of America's last wilderness areas. It is among the most culturally rich regions of America, home to Cajun culture as well as a diverse population of European, African, Caribbean and Native American descent.

The region was established as a federal Heritage Area in 2006 in partnership between the state of Louisiana and the National Park Service, to raise national awareness of the Atchafalaya River Basin, increase visitation and expand economic development opportunities. The heritage area has a tax credit program for small businesses.

The Heritage Area's oversight agency, the Atchafalaya Trace Commission, is in the final phase of the process of creating a required 10- to 15-year management and development plan for the 14-parish region. The plan will implement activities to protect, interpret and enhance the natural, scenic, cultural, historic and recreational resources of the Heritage Area.

The 14 Heritage Area parishes are Ascension, Assumption, Avoyelles, Concordia, East and West Baton Rouge, Iberia, Iberville, Lafayette, Pointe Coupee, St. Landry, St. Martin, St. Mary and Terrebonne.

For more information, visit www.atchafalaya.org. For information on the small business tax credit program, contact Debra Credeur at dcredeur@crt.state.la.us or 225-.219-0768.



The Atchafalaya Basin

Audubon Golf Trail

Louisiana's Audubon Golf Trail is a series of pro-caliber courses statewide that offer challenging golf surrounded by all of the state's music, cuisine and cultural offerings. Today, Louisiana boasts a trail as unique as the state itself. The Audubon Golf Trail gives new meaning to our nickname, "Sportsman's Paradise."

Member Courses:

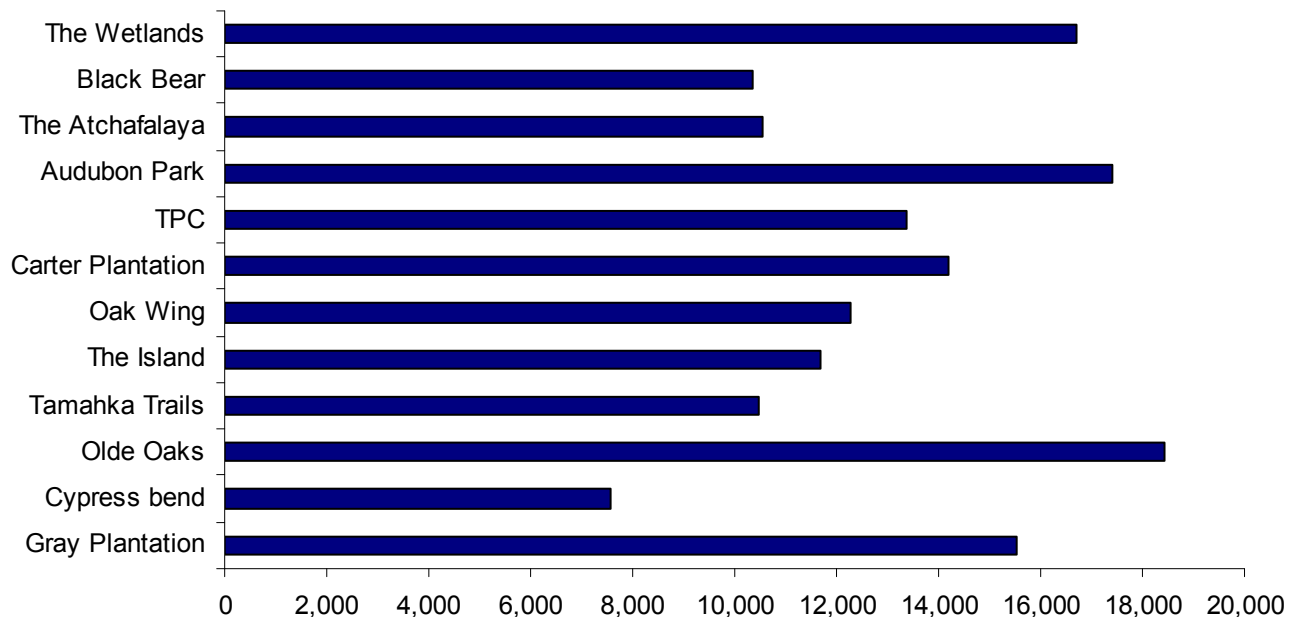
- ◇ Audubon Park, New Orleans
- ◇ Black Bear, Delhi
- ◇ Carter Plantation, Springfield
- ◇ Cypress Bend Resort, Many
- ◇ Gray Plantation, Lake Charles
- ◇ The Island, Plaquemine
- ◇ Oak Wing Golf Club, Alexandria
- ◇ Olde Oaks Golf Club, Shreveport
- ◇ Tamahka Trails Golf Club, Marksville
- ◇ Tournament Players Club (TPC), New Orleans
- ◇ The Atchafalaya at Idlewild, Morgan City
- ◇ The Wetlands, Lafayette



Golf Week Magazine's Top 5 public courses in state are:

1) Atchafalaya Idlewild; 2) TPC Louisiana; 3) Black Bear; 4) Carter Plantation; and 5) Gray

Total Year to Date Rounds Played



The New LouisianaTravel.com

Come and take a look at some of features on the all new LousianTravel.com:

Smart search suggest and Robust property search tools

Using predictive text clues, the site can suggest items visitors are searching for, allowing for correct spelling and better search results

Powerful mapping

This tool allows users to better plan trips using accurate geographical features and highlighting sites "on the way."

Rich Multi Media

Video, audio and slideshows bring users into the Louisiana experience, allowing them to see firsthand the difference between Zydeco and Jambalaya.

Integration with popular social media sites

Users are able to connect information from Louisianatravel.com to Facebook, Twitter, MySpace, Digg and other sites.

We would love to hear what you think, so be sure and give us your feedback.

The screenshot displays the LouisianaTravel.com website. At the top, a navigation bar includes 'home', 'places', 'experiences', and 'my louisiana', along with a search bar and a 'Find' button. A large banner features a chef, Josh Besh, with the word 'Culinary' in a script font. Below the banner, a section titled 'The Newest Stuff We've Got' shows a historic house and a map of Louisiana with a note to 'Click on the map to explore Louisiana'. To the right, a 'Book Accommodations' section prompts users to 'search hotels' and 'Plan Your Trip'. A 'Sign up!' section for an 'e-NEWSLETTER' is also present. Below these, a 'Top Links' section categorizes links into 'Hotels & Motels', 'Parks', and 'Restaurants'. A 'Take Note' section highlights events like the 'ESSENCE MUSIC FESTIVAL', 'LOUISIANA culinary trails', and 'Pride of Place'. At the bottom, there is a feedback form, a 'MAPS | SEARCH PLACES | HOTELS EXPERIENCES' navigation bar, and a 'Read the Louisiana Travel Blog' link. Social media icons for YouTube, Flickr, and Twitter are shown, along with a copyright notice for the Louisiana Office of Tourism.

Cruise Industry Generated \$163 Million To State Economy In 2008

The North American cruise industry contributed \$163 million in direct spending to the Louisiana economy last year and generated 3,168 jobs paying \$121 million in income, according to a study commissioned for the Cruise Lines International Association.

In 2008, 179,000 people embarked on cruises from the Port of New Orleans, down about 30.6 percent from the 258,000 who sailed from the port in 2007, the study showed.

Those figures both were lower than the number of travelers in 2005, when cruise service was interrupted because of Hurricane Katrina. New Orleans had four home ported cruises before Katrina but now has just two.

Nationwide, cruise spending totaled \$19 billion in 2008, a 2 percent increase from 2007. The industry also generated 357,710 jobs, according to the report.

-- from the New Orleans Times-Picayune

For reference, please cut out facts



What does Tourism do for Louisiana?

- ◇ Attracts 24.1 million visitors to the state annually
 - ⇒ Airports enplane over 5 million passengers
 - ⇒ 18.3 million hotel room nights sold
 - ⇒ 1.9 million convention room nights sold
- ◇ Generates \$9.4 billion annual spending in Louisiana businesses
- ◇ Without \$850 million in tourism generated tax revenue, every Louisiana household would have to pay \$550 in additional state tax
- ◇ Every dollar invested in tourism advertising returns \$17 in tax revenue
 - ⇒ For every \$1 million cut from the tourism marketing budget, the state loses \$17 million in tax revenue
- ◇ Directly employs over 140,000 in a variety of sectors:
 - ⇒ hotels
 - ⇒ restaurants and bars
 - ⇒ gaming and amusements
 - ⇒ food and beverage stores
 - ⇒ retail shops
 - ⇒ construction
 - ⇒ transportation services
 - ⇒ gasoline stations
 - ⇒ real estate
- ◇ Creates an additional 60,000 jobs in secondary employment throughout the Louisiana economy
- ◇ 1 out of every 12 people in Louisiana is employed as a result of the tourism industry
- ◇ Generates \$5.7 billion in wages and salaries for residents

Industry News & Trends

"Curtailed spending, fluctuating mood among consumers, a rise in the savings ratio - all are evidence of the 'new normal' that define the future and the marketplace in which we operate."

-- Dr. Suzanne Cook, senior vice-president of research, U.S. Travel Association

International visitors' purchases of travel-related goods and services in the U.S. were **down 17% in April** compared to the previous year, according to the U.S. Office of Travel and Tourism Industries. Fares received by U.S. carriers and vessels decreased nearly 18%. Travel and tourism-related exports decreased 12%.



The U.S. Travel Association continues to forecast a **2.2 percent decline in summer domestic travel**, with domestic leisure down 2.5 percent for the full year. Business travel is expected to be off 5.8 percent in 2009, as all segments of business make adjustments due to developing consumer trends in reaction to national economic conditions.

Year-to-date data show 2009 unfolding as **the weakest year since the 2001 downturn**, and one with the most sizable declines seen in travel during any prior postwar recession, according to James V. Cammisa Jr. of Travel Industry Indicators. Cammisa reports:

- Domestic trip volume is down 8.3 percent and domestic air enplanements are down 10.7 percent through May versus last year.
- Cruise pricing is down 12-14 percent, domestic air pricing by 11 percent, and domestic hotel rates by almost 9 percent.
- Major destinations Las Vegas, Orlando and Hawaii are down 7.2, 10 and 14.5 percent respectively in both visitor counts and spending.

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LOUISIANA

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This publication is designed to inform the reader on current trends in the travel industry. Quotation and reproduction of the material is permitted with credit to the Office of Tourism.

'Statistical Spotlight' To Debut in Louisiana Travel Pulse

The Louisiana Office of Tourism's Research and Development Section's Louisiana Travel Pulse newsletter will include a "statistical spotlight" section in upcoming editions.

"Statistical Spotlight" will offer more in-depth statistics and analysis into aspects of the tourism industry tracked by the Research and Development Section.

When applicable, analysis will include interviews with field-related specialists who will interpret data, identify trends, forecast short-term and long-term expectations and predict changes.



Research Terms

Enplanements - a count of the number of passengers who board an airplane at one of Louisiana's metro airports.

Average Daily Rate (ADR) – Room revenue divided by rooms sold.

Occupancy – rooms sold divided by rooms available.

Rooms available (Room Supply) – The number of rooms times the number of days in the period.

Room revenue – total room revenue generated from the sale or rental of rooms.

Rooms sold (Room Demand) – The number of rooms sold (excludes complimentary rooms).

Adjusted Gaming Revenue - Net gains realized by a casino after payment of all cash paid out as losses to patrons.

Welcome Center Visitors - the number visitors who sign the register at Louisiana's 13 state welcome centers.

Recreational Visits - The entry of a person onto lands or waters administered by the NPS for recreational purposes.